

KAMINSKY, THOMAS, WHARTON & LOVETTE

PROBATE QUESTIONNAIRE

Kaminsky, Thomas, Wharton & Lovette

Today's Date ____/____/____

Intake Atty: _____

Decedent's Full Legal Name: _____

Date of death: _____

Date of birth: _____

Spouse's Name: _____; If deceased, date of death: _____

Decedent's Social Security No.: _____

Address at time of death: _____

Employer: _____

Relationship of client to decedent: _____

Person nominated in Will to be Personal Representative: _____

Address: _____

Social Security No.: _____ Date of birth: _____

Telephone No.: _____ Cell Phone No.: _____

Below is a checklist of the items that you will need.

- [] Last Will & Testament (Original)
- [] List of heirs (names, addresses & SSN)
- [] List of all financial institution accounts
- [] List of all stocks, bonds, IRAs, 401K
- [] Death Certificate
- [] Deed to all real estate
- [] All insurance policies
- [] Title to all motor vehicles
- [] List of creditors
- [] LLC/Corp documents
- [] Trust documents
- [] Signed fee agreement
- [] Retainer

REAL PROPERTY

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	MARKET VALUE	AMOUNT OF ENCUMBRANCES

VEHICLES

(Cars, Boats, Trailers, Motorcycles, Motor homes, Airplanes, etc.)

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	MARKET VALUE	AMOUNT OF ENCUMBRANCES

CASH AND DEPOSIT ACCOUNTS

(Banks, Savings & Loans, Credit Unions, Savings, Checking, Certificates of Deposit,
Money Market Accounts, etc.)

DESCRIPTION	ACCOUNT NO.	OWNERSHIP (Joint, Entireties, Etc.)	VALUE

STOCKS AND BONDS

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	MARKET VALUE	AMOUNT OF ENCUMBRANCES

LIFE INSURANCE

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	FACE VALUE	CASH VALUE AGAINST POLICY	AMOUNT OF LOANS

**INVESTMENT ACCOUNTS
PENSIONS, PROFIT SHARING, RETIREMENT ACCOUNTS, ANNUITIES AND
ALL OTHER PERSONAL INVESTMENT ACCOUNTS**

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	ESTIMATED VALUE	AMOUNT OF ENCUMBRANCES

BUSINESS INTERESTS
(Partnerships, Corporations, etc.)

DESCRIPTION	PERCENTAGE OF OWNERSHIP	ESTIMATED VALUE	AMOUNT OF ENCUMBRANCES

ACCOUNTS RECEIVABLE
(Notes, Contracts, Mortgages, Debts)

DESCRIPTION	GROSS VALUE

HOUSEHOLD FURNITURE, FURNISHINGS, APPLIANCES

DESCRIPTION	GROSS VALUE

PROPERTY WITH INTRINSIC OR ARTISTIC VALUE
(Art Objects, Paintings, Antiques, Rare Books, Coins, Stamps, Jewelry, Heirlooms, etc.)

DESCRIPTION	OWNERSHIP (Joint, Entireties, Etc.)	MARKET VALUE	AMOUNT OF ENCUMBRANCES

CHILDREN
(Natural or Adopted)

NAME	DATE OF BIRTH	ADDRESS

BROTHERS & SISTERS
(Natural or Adopted)

NAME	DATE OF BIRTH	ADDRESS

CERTIFICATION

By my signature below, I certify that all of the information herein is true and correct to the best of my knowledge.

Date: _____

Signature _____